

The audience measurement in Albania – Efforts to institutionalize the process

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Abstract

The media market is overloaded; the new operators sign their name as competitors for advertising space, and the need to improve the quality for the media communication campaign is growing; but, paradoxically the media operators have left the audience measurement - the only criteria who can regulate this market - out of attention. Only well-educated persons, with an affinity for technology, which are very keen to the development of this specific market, are trying to make sense and just not to leave it as a niche reality. In this article we will try to explain why the media operators are not embracing this new reality, boosting informality in the sector, with bad consequences for the quality of the media programming schedule offer. What are the real reasons, and the balances broken out from the implementing of the new rules in the market? The problems seem to be systemic, and in this way they should be sorted out.

Keywords: *media planning, electronic measurement, advertising agencies, measurement agencies, tv programming, ratings.*

The monolithic overview of the Albanian media up to the '90s would not permit us to display any arguments that are related with to decentralized space of the media today. While the property was centralized, the market's rules were meaningless in a planned economy that was centred in the hand of the state. The audience could not be envisioned in accordance to an economic dimension, because it was not a determining factor in the economic thrift of the media. Actually, the concept itself was to be questioned since the media was

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only a transmitting "tube" of the state's bureaucracy. It was more seen as a transmitter of cultural substances culturally and ideologically correct.

The discussion is too complex to be assessed as a whole. Nonetheless, it is important to state that neither the media, nor the audience were fully integrated in the market's logistics. As a consequence of this, the media did not depend on the audience and vice versa.

With the decentralization of the property and the integration of the media in the market's logistics, everything was over-thrown since the media had now multiple actors, which were becoming competitors. The profitability of the media as a business, became the colony of its well-functioning; from an autonomous closed system, the media actors started depending on external factors. Economically, they needed outer financial resources, which in turn are translated in advertising spaces for businesses which want to be known to the public's eye. Advertisement is the media core in any given situation, in any time, it is the sole and the only one that guarantees continuity, which means, in turn, that the media must attract the interested subject and offer a very favorable schedule to the potential customers.

The Paradox

The growing number of TV stations and broadcasting platforms in the market is in need of more sophisticated schedules for the advertisement planning. On the other hand, the growing complexity of the procedures and the cost calculation of television time in the ads broadcasting is in need of a higher level of responsibility and professionalism of the actors of this market. Of course, these dynamics lead to the unification of measuring procedures and to the meticulous depiction of the latter. The purpose for this is to increase the variety of the offers and to attract the advertisers.

Never before, the credible and easily readable data on TV audience have been more important than today. In the market of the Albanian advertisement industry, it regulates:

the basic unit of ads scheduling;

the drafting of the structure of TV's programming; and
the selling of TV time to the advertisers.

Even though, as we will see later on, the measurements have not been continuous, thus, they have not given us a clear picture of the media market, it is surprising that we have a growing number of channels, which are dismembering the market that is already shrunk as a result of the lowered expenditures after the 2011 crises¹. In short, the media itself that is supposed to revive the market, is threatening itself and the market in general by demanding an advertisement space for the same actors that have already spent money for the ads². We can safely say that the channels' number is in disproportion, and in the absence of an economic logistics, new channels continue to be created.

A. Two words on the measuring system of TV audience.

The measuring system of TV Audience or TAM (Television Audience Measurement) is a specialized branch in the field of the media market's study. Its purpose is to evaluate the quantity (quantification) and quality of the detailed data regarding the viewing of TV programs and the commercial interruptions during the airing of the TV programs.

The TAM service is a key tool in the organizing and managing of every field covered by the advertising industry overall, and the TV broadcasting in particular. For this reason the QUALITY of this data is the most important parameter for the audience evaluation and measurement.

The data for the TV viewership (audience) are used mainly by TV operators to:

¹ Look at the table below which indicates the decreased expenditures in ads for the 2011 in comparison with 2010.

² The domination of the mobile industry in the Albanian media advertising space, is detailed in this article : Goci. E (2010) *The Dynamics in scheduling the programming of visual media*, FHPH.UT edition, pp 199-206 - Conference of the Journalism and Communication Department, "The Albanian Media in Transition".

evaluate the success of the program they produce or buy;

help them in the decision-making regarding future program investments

help them in planning a more efficient schedule and the adequate commercial time.

In the case of commercial televisions, whose business model is based on profiting from the commercials, the high quality data regarding the audience is vital in order to determine the price (cost) and the selling of their commercial time while broadcasting. TV channels need the TAM data to draw the programming and plan their broadcasting strategies and marketing to sell their commercial time to the companies and businesses interested to advertise on TV.

The below data indicate the absolute dominion of television in comparison with other media regarding the advertising. Printing has experienced an increase up to 2008, and then a significant decrease because of known dynamics, internet also is registered for the first time as a factor in 2007. For this is sufficient to see that the money spent on advertising have at least doubled since 2006, meanwhile the television weight is still dominant. In 2012-2013, we can see (tab 3) that ad market only expand, the TV continues to dominate, but radio and especially the print media show sharp difficulties to maintain the trend of other media, losing terrain in the advertising battle. We can also see that "Telecommunications" (tab.3-tab.4) are the main players - (payers), with "Vodafone", and Eagle", that continue the struggle to dominate the ad-market, trying to play a leadership role, but as i marked in an observation done in 2010-2011, AdEx, means nothing when we confront them with the figures of market share (SoM).³

³ Goci, Ervin., *The promotion and curation of the image of mobile phone companies in Albania, during 2010-2011*, pp 103-112

(Ed) AA.VV "Integrated Communication - Concepts, Practices, and Strategies", 2011/4 , Department of Journalism and Communication, FHPH Edition, University of Tirana

Authors' Estimates*	2006	2007	2008	2009	2010 Projection	2011 Projection
Media						
Television	78.20%	63.60%	63.80%	68.70%	65.40%	66.80%
Radio	1.20%	1.40%	1.40%	1.30%	1.40%	1.40%
Print	5.80%	20.10%	17.80%	8.50%	10.70%	8.50%
Outdoor	14.30%	15.60%	17.40%	21.80%	20.80%	22.42%
Cinema	na	na	na	na	na	Na
Internet	na	0.50%	0.80%	1.10%	0.90%	0.90%
Total Ad Market	29,095,235	51,955,777	48,000,000	64,124,830	69,210,740	66,540,440

Tab 1.

Total Media Ad \$pend during 2013 vs 2012		2012	2013
Mil - Lek			
Media			
TV		101,821,711	136,933,236
Radio		1,367,288	1,322,913
Print		7,236,715	6,640,760
OOH		8,001,408	9,105,785
Web		716,085	974,952

Tab 2. Resource: Abacus Research

Likewise, even the advertisers or the companies that have ordered the commercials in the TV channels, also their advertising agencies, are in dire need of the TAM data in order to evaluate and maximise the effectiveness of their marketing investment in buying the commercial space on TV and the distribution of commercial budgets in different media.

The data on audience viewership are used by companies/institutions that spend on the commercial to plan and charge their respective advertisement campaigns and buy the commercial time of the broadcasting of these campaigns on TV.

The advertisement expenditures are topped by the telecommunications companies that cover more than 70% of the expenditures.

Company	2010	2011
Eagle Mobile	780,930,784	754,441,020
Vodafone	681,055,555	700,154,363
AMC	647,520,345	559,685,742
Plus	144.781	376,373,336
TOTAL	2,109,651,465	2,390,654,461
Company	2010	2011
Eagle Mobile	37.02%	31.56%
Vodafone	32.28%	29.29%
AMC	30.69%	23.41%
Plus	0.01%	15.74%
SoV (share of voice) lek	Exp. (lek)	Exp. (lek)

Tab 3. of 2010-2011⁴

Resource: Abacus Research

Q4 2012	Advertiser	Total	Q4 2013		
	Vodafone	469,579,791		Vodafone	721,164,647
	AMC	260,164,387		Amc	552,361,017
	Albtelecom	179,352,199		Alb Telecom	159,650,700
	Eagle	148,025,466		Eagle	567,304,841
lek	Plus	144,419,993	lek	Plus	115,627,910

Tab 4. of 2012-2013

Resource: Abacus Research

The expenses that reach a value of over tens of millions Euro, exchange hands based on the information about the audience. Exactly for this reason, it is demanded a high-quality service in the measurement and evaluation of the audience. The evaluation of

⁴ These data are accessible in this article : Goci, Ervin., *The promotion and curation of the image of mobile phone companies in Albania, during 2010-2011*, pp 103-112 (Ed) AA.VV *"Integrated Communication - Concepts, Practices, and Strategies"*, 2011/4 , Department of Journalism and Communication, PHPH Edition, University of Tirana

viewership is what guides this kind of business. In other words, the broadcasters need a reliable information about the viewership, in order to take their programming decisions, and at the same time, either the companies/institutions the invest money in commercials, or the broadcasters and advertising companies that negotiate between the aforementioned parties, need a "common currency" in trading the broadcasting time to be more efficient.

Therefore, for the millions spent every year in the programmes and commercials on TV, it is needed an exact information about the audience of the TV, in order to evaluate and maximize the efficiency of this investment.

B. The Ratings - The common currency of the transactions of commercial time on the television

In the markets, where you can obtain the data of television viewership, the value, or the level of viewership is defined by the rating data of the audience. In this way, the "rating" becomes the "common currency", through which, the players on the market have the possibility to charge and negotiate the buying and selling of the commercial time on television.

Only if the rating data are reliable and correct, then they can be transformed into the common currency to trade commercial time in television. Therefore, the media-planners and the specialized buyers of time in the media (media-buyers), as well as the marketing specialists in the relevant companies, can evaluate the alternative offers of televisual programmes for the fulfilment of their marketing objectives, whereas, programming and advertising managers in the television channels can evaluate their programmes or station's popularity. Hence, they can determine how much should they charge for the commercial time during a programme on a certain television.

In order to assure the adoption and the usage of TAM data by all the concerned parties, the system of television audience measurement should be:

- a. **reliable**, where, every element of the process of collection, analysis and publication of such data, could be verified through ordained computer systems, or other methods;
- b. **independent**, when the provider of this service operates from a position completely neutral, or totally unbiased , and is widely-accepted from all the players on the market;
- c. **transparent**, where every element of the system is easily understandable and open, or reachable, by the qualified auditing of all the players interested in these kind of data in the market.

C. The Structure of the Business

The everyday practice in the advertising industry and the studies conducted by the experts, reveal that the electronic media constitute the most important sector of the Albanian media market. Even though the continuous professional development, the electronic media has not adopted yet an efficient self-regulating system, because the lack of reliable studies, monitoring, scanning and other continuous methods to collect data about the viewership of electronic media, are still an obstacle for an accurate analysis of Albanian electronic media market.

The number of television channels continues to increase and it can also be said that even the quality is increasing. But without systematic and reliable studies of the viewership, the actual percentage of the market for every channel is still unknown.

The Institute of Survey and Opinions, which has previously tried to measure the TVs viewership (2001-2002-2003 sponsored by IREX-USAID)⁵, made a new attempt to study the media audience during 2006-2009⁶, in collaboration with the Croatian company Plus-Strategic Marketing Research. They made use of the following survey method; they kept a one-week diary of 1000 families in all Albania.

⁵ ISO (the Institution of Surveys and Opinions), *The Readability and Viewership of Media-A Statistical Study*, ISO Edition Tirana, October 2001

⁶ A diary with a two-phased measurement, one in spring and one in autumn, and another one in spring 2010.

Nonetheless, it is still too early to have clear results, since the TV itself and the other actors of the advertising industry, at least the majority of them, have not adopted this technique in measuring the audience as a result of various hiccups that stem from the methodology and measuring instruments of this system.

In addition to the 6 national operators, (4 operators that broadcast with the frequency band UHF and 2 operators broadcast through the satellite platforms. For further details, look the KKRT list of the licensed broadcasters in Albania that is to be found in the Appendix of this document), momentarily there are 68 local TV stations, of which 20 operate in Tirana. The majority of ad expenditures is to be found in Tirana's TV stations, and also in the West Lowland region. These have a better economic performance and programming than the local stations, which find it difficult to survive and produce quality programs. Whereas the media centered in the West Lowland have a greater opportunity to profit from a larger advertisement market, which cannot be said for the media situated in deeper areas.

Also, because of economical difficulties, local TV stations find it difficult to adapt with the technological advancement. Whereas, the majority of the TV stations situated in Tirana have state-of-the-art equipments, local stations continue to make use of outdated equipments, which affect their product.

D. The market's actors interested in the TAM Ratings data:

The typical consumer of the products/services of the viewership ratings data are:

- (a) advertisement agencies and media planning, scheduling and/or buying services agencies,
- (b) the TV networks and channels, and also
- (c) business companies/ organizations, public institutions, local and/or international, that buy TV commercials.

All these actors feel the necessity of having a system for the acquiring and the analysing of the rating data and the measurement of the TV audience. This service will enable these actors to better the marketing performance of their businesses, and, consequently, to

profit as a result of the increase of the sales or the brand recognition by the consumer as a result of the appropriate marketing investments.

Also, this service is addressed even to other governmental institutions, independent ones, researching and academical ones, which have a special interest in comprehending and studying the media market. The information on the audience data obtained by the TAM service can be utilised by the users of these data in order to buy and sell television time, as well as to make better decisions regarding TV programming. Thus, it is converted in a "shared currency" for the transactions between the buyers and sellers of the TV commercial time.⁷

Without the existence of an independent measuring system as a third party, which adopts higher standards of accuracy and integrity, the television market could not function effectively. For a more accurate managing and to provide maximal transparency, which helps with the acquiring of credibility in the service of measuring the TV audience, the company should also take into consideration the implementation of the recommended "best practices" regarding the activity of measuring the TV audience in other countries which have made use of this service for a long time and refer to the GGTAM instructions edited in 1999 (GGTAM: Global Guidelines for Television Audience Measurement).

E. The attempt to ensure the TAM data for the media Albanian market and the financing of this service

The market study is relatively a new phenomenon in the Albanian media. The autonomous evaluations of the so-called "ratings" were not common practice in the past and all other attempts were demanded by special TVs, and as such, have often been suspicious for

⁷ For a better understanding of this idea, read the article: Goga, T. (2010). *The absent consensus of the measuring of the media's audience in Albania*. The Conference of the Journalism and Communication Department, the Faculty of History and Philology, The University of Tirana, "Albanian Media in Transition".

the credible and fair mechanisms of the evaluation of the press run and audience levels.

CEI - Contemporary Evaluation Institute

In 2001, CEI (Contemporary Evaluation Institute) drafted a project for the measurement of the TV Audience, with its own financing, using the methodology of random surveying through telephone calls, but that was not followed by other efforts, thus not securing contracts with the client media and the market's player.

AMI - Albanian Media Institute

AMI publishes the annual report "Monitoring the Albanian Panorama", published for the first time on April 2001. These editions contain information regarding the media panorama of the country. The whole information published in these editions is based on the data by the owners, publishers and editorial boards of these media outlets, and aims to maintain a database for variable media panorama in Albania. These studies are conducted by the researchers of the Albanian Media Institute, under the supervision of the Journalist's Dutch School and are supported by the Dutch Agency for the International Development, and also by other international partners.

ISO - The Institution of Surveys and Opinions⁸

IREX ProMedia - an agency in the heart of the USA that supports the media development in Albania - collaborated with the Institution of Surveys and Statistics (ISO - a local statistical organization) to draft an independent survey sponsored by USAID. In it, they used the method of a 28-day diary for 14 inhabited centers of the country. In 2001, ISO adopted Nielsen's diary method for the measurement of the Albanian media audience. Its intention was to offer the so-called "Audience ratings" [the media audience ratings].

⁸ ISO (the Institution of Surveys and Opinions), *The Readability and Viewership of Media-A Statistical Study*, Tirana 2001

He used the 28-day viewership diary to measure the audience behaviour of more than 3000 individuals. Much of the survey dealt with the preferences of the sample viewers in the districts regarding the radio and television stations, national and local.

According to ISO, the sample size was sufficient to gather representative information that would reflect the listeners and viewers' behaviour. Also, the survey contained information on readership of daily newspapers and weekly magazines based on the samples of readers in the districts. The same institution repeated the "rating" survey in 2002 and 2003.

Pulse/Strategic Marketing Research

In collaboration with the Croat Company Puls/Strategic Marketing Research, ISO has conducted 5 surveys on measuring the electronic and written media audience starting from October 2006 until June 2008. Also, this company conducted three other studies in May and November 2009 and also in June 2010. The method used was that of interviewing the population (a sample of 1000 individuals that represented the Albanian population) by using a 1-week diary, for obvious reasons, it seems that the Albanian commercial market has not adopted the system of audience data measurements.

Abacus Research

In June 2011, the media research company, "Abacus Research", started the implementation of the project of a continuous electronic measurement of TV viewership⁹. It made use of the measuring technology devices, such as the "people-meter" (STBs – Set-Top-Boxes) installed in some building samples that represent the Albanian population. Initially, the STB mounting project concentrated in the Tirana Municipality. In the first week of November 2012, 265 STBs were installed, by thus totalling a sample of 1007 individuals that

⁹ To open the discussion of impleementig the electronic measurement procedure in Albania :
Lela, Alfred., TV audience, "Each its own dues?", "Mapo" newspaper, 10th July 2013, page 9-19

represented the population 14 and above (14+) of the Tirana Municipality. They were chosen in accordance to the pre-set demographic characteristics of the results and findings of "the establishment survey" of 32,000 households conducted since 2010. Meanwhile, about 250 other STBs are to be mounted in the remaining part of the Albanian territories by covering the West Lowland, Scutary included in the North, and Saranda in the South; eastern and south-eastern; as well as the north-east, to achieve a sample of 1,000 individuals (ie, 2,000 in total, with 1000 in Tirana + 1000 in the remainder part of the territory).

Telemetrix

The "Telemetrix" company, serving for "IDRA Research&Consulting and IdraMedia"¹⁰, operates in the Albanian market of audience measuring, electronically measured (TiViMat), since September 2012. Telemetrix runs its activity based on an audience panel composed of 350 families scattered in the six biggest cities in Albania, Tirana, Durres, Elbasan, Shkodra, Fier, Berat. Their intention is to expand with 250 additional families¹¹. As Mr. Ermal Cela (Operational Director of Telemetrix) confirms : the reason why these cities were selected has little to do with the characteristics of Albanian audience behaviour¹², which in relation with the media it shows no difference between the country and city. This justifies also the uniformity of the panel, mainly in the urban centres. Furthermore, 80% of the consuming force is concentrated in these cities. Telemetrix offers data

¹⁰ IDRA Research and Consulting and IdraMedia, operates in albanian market since more then ten years , with a lot of services, including : market studies, media research, monitoring advertising (AdEX – Advertising Expenditures), and media audience measuring, "Telemetrix". **IDRA is member of the European Association of Opinion and Marketing Research Professionals (ESOMAR)**

¹¹ For remote information look at the article : Liperi, Ornela., *Audience : And "The Remote Control"decides., "Monitor" magazine*, 27th April 2014 - <http://www.monitor.al/dhe-telekomanda-vendos-2/>

¹² Data, regarding to the characterisics of albanian audience, were provided from "Establishment Survey", provided by IDRA, with a sample of 3000 peoples, spanned in the Albanian territory

processed by computer programs and updated three times per minute for 45 UHF/VHF analogue, digital cable and satellite channels.

A peculiarity of this little specified market is that the media is not the one who once embraced it, but quite the opposite; it was the business, mainly the advertisement agencies, which acted as a moderator in the building relation between business and media. Mr. Ermal Cela notified me that not long ago, after two years of negotiations, the first contract is signed with a media, namely Channel "News 24", which shows an innovation in this market.

It became a costume that the media "Anchorman" acquired the data for their interest, but up to date, no media have shown interest in having continues data for the entirety of the programs they offer. The clients of "Telemetrix" are the following:

Vodafone Albania, Mccann Erickson Tirana, LeSpot Group, AGNA Group, ProMedia, Ogilvy & Mathers, NewMoment.

Subjects	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
AMI	✓													
Institute for contemporary Research	✓													
Iso/Irex usaid	✓	✓	✓											
Puls.SMMRI						✓	✓	✓	✓	✓				
Abacus											✓	✓	✓	✓
Telemetrix											✓	✓	✓	✓

F. The Advertisement Industry

The main reason for the CEO and marketing specialists to acquire these data regarding the performance and TV audience ratings in the market is to enhance and remunerate their business practices in marketing and advertisement planning, thus, making successful decisions in designing cost-efficient media-plans, and as a result, that will increase their companies' profits.

In general, market viewership data (TAM Ratings) is composed of three large groups of actors, who base their activity, the buying and selling of TV commercial time, on the viewership data:

1. Television and Media Groups

- a. Determining the Financial Value of TV Commercial Time. Through the TAM ratings Data (or viewership), TVs and media companies have the opportunity to determine the monetary value of the time at their disposal to air the advertisement. (The same concept and media measuring methodology is adopted also for the selling of the advertisement space/surface in the print media, although this is not the object of this document). This is also their main obligation in the marketing department and TV selling, as well as in their financial departments.
- b. Program's Quality and the Predominance on the Competition, TV programming departments are extremely interested in the viewership data of their programs. The clear objective of this is to build a successful programming structure that would help them win the audience battle against other competitor televisions in the market.

2. Advertising agencies and specialised agencies in buying TV Commercial Time (Media Agencies)

TAM ratings data are the fundamental information, where media services departments within the advertising agencies and specialized ones, base all their activity when buying commercial time to:

- a. draft media-plans for the expenditures and distribution of their clients' budget for various commercial campaigns on television.
- b. process the reports on the media market and marketing study.
- c. make Pre- and post-Buy analyses (which evaluate the possibility of success or failure of the proposed and executed commercial campaigns by the advertising agencies for their business clients) and a number of other activities these business operators have to offer.

3. Big and/or medium business companies

- a. The latest developments in the advertisement market, especially in the telecommunication market, where except the two first mobile operators, AMC and Vodafone, two other operators were added, Eagle Mobile and Plus Communication, and in the financial/banking market, where it is noted a significant increase in commercial spending of the banks operating in the Albanian market, also, the strengthening of the retail market with the introduction of important actors, as well as the automobile selling companies, the adaptation of the audience measuring data of the advertising industry is now a necessity.
- b. Aside from the significant increase in the advertisement budget, now it is demanded that the media performance of the invested ads ought to be able to afford sophisticated rival marketing techniques.

Investors and/or entrepreneurial organizations in strategic sectors, local and international public institutions greatly interested in the media researching field, study periodically the measuring of opinion, thought, taste, preference, won't and behaviour of the public or consumer. These studies are very important in studying the market, though they are not real time audience measuring or other forms of it. The financial weight of this study is dominant when in comparison with the audience measuring.

Issues for debate

The market study is in its first steps, but there is a significant increase in institutionalising this evaluating instrument with ongoing studies. An integral part of these projects is also the evaluation of preferences, behaviour and won't of the media, though there lacks a continuous measuring of the latter. What could be the possible reasons?

Firstly, the financial hiccups - how to understand this?

In general, the market expert report that in the stabilised markets, about 2-4% of the volume in the advertisement market, normally goes

for market research in all its plenitude, including the service of the audience measuring. The question is: Has our market developed enough volume so that the sum derived from its growth can suffice to guarantee the progress of the service in the continuing of the audience measuring? So, what we are trying to say is: are there enough money in the communication and advertisement market in order to front the financing of such a service?

Secondly, it requires a common will of the actors directly involved in this market, initially to agree on the importance of continuous measurement, and to create the measuring metrix, as a unifying language, and also to agree on the sharing of the cost, managed by a self-regulated institution of this market. (media, advertising agencies + advertisers) + regulators.

Resources, human and professional capacities

A third reason, apparently unimportant, but which has a great significance, deals with human and professional resources to implement this new reality, which is not only technological, but, first of all, educational, it demands professional knowledge, scientific mentality and ought to be expanded into all media, not only measuring agencies.

A common communication register between interested actors, so that everything can be scientifically explained, in all fairness.

Psycho-social environment

Fourthly, we must not forget that in this universe, as everywhere else, we deal with a psychological relationship between people. There are instances of fear, uncertainties, dynamics that affect this universe. In many cases, human relationships are based on giving verdicts and on psychological customs acquired by experience.

In a study of the media research centre "Forrester"¹³, with the media marketing departments, agencies and businesses, it was noticed that one of the biggest obstacles in reforming the marketing modality where the customs established in the working environment.

In conclusion, we can safely say that all the above-mentioned actors are important indicators that require a scientific research, as quantitative as well as qualitative, so that we can base a discourse on the possible future scenarios in the market development of the audience measuring in particular and the media space as a whole.

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